



WORKSOURCE MONTGOMERY, INC.  
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ROCKVILLE, MD 20852

REQUEST FOR PROPOSALS (RFP)

INITIAL PERIOD OF PERFORMANCE:  
JULY 1, 2025 – JUNE 30, 2026

WIOA Out-of-School Youth Programs

FUNDED UNDER

THE FEDERAL WORKFORCE INNOVATION AND OPPORTUNITY ACT

**ISSUED ON**

February 11, 2025

**TIMELINE**

**RFP Released:** Tuesday, February 11, 2025

**Virtual Bidders' Conference:** Tuesday, February 18, 2025

**Deadline for Questions:** Friday, February 21, 2025

**Q&A Published:** Tuesday, February 25, 2025

**RFP Deadline:** Friday, March 14, 2025

**Funding Notifications:** Friday, April 18, 2025

**Contract Start Date:** Tuesday, July 1, 2025

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## **PART I. BACKGROUND AND GENERAL SOLICITATION INFORMATION**

### ***A. Background Information***

**WorkSource Montgomery, Inc. (WSM)** is a non-profit arm of the Workforce Development Board, through a united Board structure. WSM provides a variety of workforce and economic development services and supports Montgomery County businesses and residents. The services include a broad range of activities that offer our residents the skills and knowledge to succeed in developing a robust economy.

WSM is governed by a Board of Directors and Local Elected Officials (LEOs) in Montgomery County, Maryland. The WorkSource Montgomery The board's goal is to fulfill the organization's mission by successfully bringing the local workforce and economy together. It also works to execute policy determined by Montgomery County's Workforce Development Board. The board is a diverse group of thought leaders representing business, academia, and nonprofit entities in Montgomery County. The board's goal is to fulfill the organization's mission to successfully bring the local workforce and the board's goal is to fulfill the organization's mission by successfully bringing the local workforce and economy together. It also works to execute policy determined by Montgomery County's Workforce Development Board.

WSM focuses on linking local and regional economic development and workforce efforts in Montgomery County, Maryland. WSM develops a deep understanding of target and emerging industry demands, creating sustainable workforce solutions which are tailored to the region. This enhances individuals' ability to compete for higher quality jobs and helps employers compete in the marketplace.

#### **WorkSource Montgomery's Vision**

Economic development, education, and the system of talent development are aligned locally and regionally to sustain a vibrant economy in Montgomery County.

#### **WorkSource Montgomery's Mission**

- To meet the talent attraction, development, and retention needs of strategic industries.
- To meet the needs of the underemployed and unemployed.
- To develop career pathways that lead to sustainable wage jobs and support a thriving community.

#### **WorkSource Montgomery's Roles**

- We catalyze change in the community to build an effective workforce development system.
- We serve as both a facilitator and convener to identify issues and act collectively with

partners to address them.

- We act as an intermediary/broker between the supply and demand sides of the workforce system regarding current and future skill needs to ensure mutually beneficial relationships and outcomes.
- We advocate for addressing workforce development issues at the local, state, and national levels.

## ***B. Guiding Principles***

The program will provide intensive case management, career training, apprenticeships, and job placement for Opportunity Youth, aiming to close the middle-skills gap for young adults in Montgomery County, MD, and connect them to sustainable career pathways in high-demand industries.

To achieve the program goal, all WSM-funded Opportunity Youth programs are guided by the following principles:

1. *Alignment with Vision and Mission:*

Opportunity Youth programs will align with WSM’s vision and mission to address the middle-skills gap through robust partnerships between employers, training providers, and community-based organizations. Programs will integrate a whole-person approach with occupational training that emphasizes work-based learning models, including internships and apprenticeships.

2. *Emphasis on Work-Based Learning:*

Programs will be framed around training and subsidized work experiences that prioritize hands-on, work-based learning opportunities. This includes structured apprenticeships in industries with significant job growth, such as Information Technology, Bio Sciences, Transportation, and Health Care, ensuring participants gain real-world experience and practical skills.

3. *Focus on In-Demand Industries:*

Programs will align with Maryland’s and Montgomery County’s projected job growth sectors, specifically targeting industries like Information Technology, Bio Sciences, Transportation, and Health Care. Training opportunities will prioritize equipping participants with the skills required to meet regional industry demands.

4. *Career Pathways for Sustainable Employment:*  
Programs will establish clear career pathways for youth, enabling them to transition into sustainable, full-time employment in high-demand sectors. The pathways will target positions with an average starting wage of \$15.00 or higher, with a focus on providing upward mobility within their chosen industries.
  
5. *Culturally Competent and Trauma-Responsive Models:*  
All Opportunity Youth programs will adopt culturally competent and trauma-responsive program models. Staff will be trained extensively in trauma-informed case management and culturally sensitive approaches to ensure youth from diverse backgrounds feel supported throughout their journey.
  
6. *Incorporating Apprenticeships as Core Components:*  
Apprenticeships will be a core element of Opportunity Youth programs, offering participants the opportunity to earn while they learn. These structured training programs will be industry-specific and provide a combination of on-the-job training and classroom instruction, fostering skill development and direct entry into the workforce.
  
7. *Industry-Specific Partnerships:*  
Collaborations with industry leaders in Information Technology, Bio Sciences, Transportation, and Health Care will be prioritized to develop customized training programs, apprenticeships, and mentorship opportunities. These partnerships will ensure training remains relevant to industry needs and promote long-term employability.

### ***C. Program Goals***

By adhering to these principles, WSM aims to empower Opportunity Youth to achieve meaningful career outcomes while addressing the critical middle-skills gap in Montgomery County's workforce.

WSM will require a two-pronged approach to track and report programmatic results.

First, organization(s) selected for contract under this solicitation will be required to meet the WIOA performance measures that have been negotiated by WSM with the Maryland Department of Labor. Proposers should read the WIOA performance and accountability guidance published August 23, 2017, in TEGL 10-16 Change 1 for detailed definitions, operating parameters, and calculation methodologies for each measure. For the current program year, the WSM negotiated measures are as follows:

Measure	Goal
<b>Employment (Second Quarter after Exit)</b> Percentage of program participants who are in education or training activities, or in unsubsidized employment during the second quarter after exit	80%
<b>Employment (Fourth Quarter after Exit)</b> Percentage of youth who are in education or training activities or in subsidized employment during the fourth quarter after exit	75%
<b>Rate of Earnings</b> Average earnings of participants in unsubsidized employment during the second quarter after exit	\$17.15/hr
<b>Credential Attainment Rate</b> Percentage of youth who obtain a recognized post-secondary credential during participation or within one year after exit or who earn a GED or high school diploma and are also employed or enrolled in a training program leading to a post-secondary credential within one year after exit	80%
<b>Measurable Skill Gains</b> Percentage of youth who are in an education/training program that leads to a recognized post-secondary credential or employment and who are achieving measurable skills gains.	80%

Secondly, because many of the aforementioned outcomes have a lag time in reporting, WSM has established a series of standards to monitor programmatic progress in real-time, as shown in the chart below. Organization(s) selected for contracts will be required to track and report these results at regularly scheduled intervals (e.g., monthly, and/or quarterly) as may be established by the WSM.

Measure	Goal
Number Enrolled in the Program	75
Percent Participating in Work Experience	40%
Percent Completing Work Experience or Training	80%
Percent Placed in Employment or Education at Exit	80%
Percent Achieving Credential	80%
Percent Achieving Measurable Skills Gain	85%
Average Wage at Placement	\$17.15/hr

### ***D. Services Solicited***

WSM is soliciting proposals for the delivery of WIOA youth programming. The program should implement the design outlined in the Program Design Section of this RFP.

Proposers must provide all the core services outlined in the Program Conditions section below and may subcontract with one or more training partners. Proposers who subcontract with partners will remain solely accountable for meeting performance goals, managing finances, and ensuring compliance with all WSM contract terms, as well as federal and state laws and regulations—both for themselves and their partners.

#### ***Program Conditions:***

1. Proposers responding to this Opportunity Youth RFP must directly provide dedicated recruitment, assessment, comprehensive case management, paid work activities, and employer engagement services.
2. Proposers that can demonstrate expertise, experience, performance, and the capacity to deliver occupational skills training may provide the skills training component of the program. All other proposers must partner and/or subcontract with a postsecondary institution, approved union, or certified training program for the provision of occupational skills training.
3. Opportunity Youth programs must include the 14 Youth Elements and provide career preparedness according to the 12 career competencies, as outlined in Section G-3 of this RFP.
4. Opportunity Youth programs must be designed around career pathways in in-demand sectors, including hospitality, construction, biotech, healthcare, and information technology, which offer an average starting wage of \$17.15 per hour or higher.
5. Opportunity Youth programs must integrate employment readiness and education through a work-based learning component, which may include a pre-apprenticeship or apprenticeship program, internship, cooperative education program, or on-the-job training, as evidenced in a program provider/employer partnership agreement. Proposers must have proven relationships with employers in in-demand sectors.
6. Proposers must have proven awareness of community resources.
7. Proposers must offer Computer Literacy training to every participant.
8. Proposers must allocate a minimum of 25% of WIOA Youth funds to paid work activities that include academic and occupational education as components.
9. Proposers must demonstrate a successful track record in connecting Opportunity Youth (OSY) to structured apprenticeship programs that lead to sustainable careers.

## **E. Planned Procurement Timeline**

RFP Released	2/11/2025
Virtual Bidders' Conference	2/18/2025
Deadline for Questions	2/21/2025
Q & A Published	2/25/2025
RFP Deadline	3/14/2025
Funding Notifications	4/18/2025
Contract Start Date	7/1/2025

## **F. Period of Performance**

Contracts will be awarded for a one-year period, July 1, 2025, through June 30, 2026. Contracts may be renewed at the discretion of WSM for up to three additional one-year periods, contingent upon funding availability and satisfactory performance. Contract renewals will be at the sole discretion of WSM.

## **G. Funding Levels**

WSM expects that funding levels for the base year, or Program Year 2025-2026, will be approximately \$650,000 annually. Final funding levels will be determined based on the allotment of federal WIOA youth funds to the State of Maryland and WSM.

A minimum of 25% of funds awarded to providers must be spent on participant wages, fringe benefits, and direct work experience support, such as transportation, work attire, and work equipment. This also includes staff time working with employers, evaluation, employer orientation, and other related costs. Please refer to TEGL 8-15 and TEGL 21-16 (page 15) for further information.

## **H. Definitions**

For the purposes of this procurement, the following definitions will be used:

1. American Job Center (AJC): AJCs are part of the national One-Stop career center network, designed to help job seekers build their careers and assist employers in finding qualified candidates. There are two AJCs in the WSM region: Germantown and Wheaton.
2. Apprenticeships: Apprenticeships are structured, work-based learning programs that combine paid on-the-job training with classroom instruction, enabling participants to gain

industry-specific skills and certifications while earning a wage. These programs are employer-driven and provide a pathway to sustainable careers, especially in high-demand industries like Information Technology, Bio Sciences, Transportation, and Health Care. Apprenticeships typically result in nationally recognized credentials, ensuring participants are prepared for long-term success in their fields.

3. **Basic Skill Deficiency:** Reading and/or math skills below the Low Adult Secondary Education Functioning Level as measured by CASAS and/or TABE scores.
4. **Career Competencies:** Twelve skill areas identified by WSM as necessary for employment and career advancement: academic, technology/digital literacy, interpersonal (collaboration and teamwork), communication, critical thinking/problem solving, general professional, time/self-management, adaptability/continuous learning, employment management (job-seeking), financial literacy, and integrity/ethical decision-making.
5. **Career Pathway:** A program design incorporating proven intervention strategies and best practices that connect systems, programs, and services to better serve and meet the needs of Opportunity Youth.
6. **CASAS:** Comprehensive Adult Student Assessment System, the required tool for pre- and post-testing of participants' math and reading skill levels. Proposers must be, or become, qualified to administer CASAS.
7. **Credential:** This indicator measures the attainment of two types of credentials: a recognized postsecondary credential, or a secondary school diploma (or its recognized equivalent). A recognized post-secondary credential consists of an industry-recognized certificate, a certificate of completion of an apprenticeship, a license recognized by the State or Federal government, or an associate or bachelor's degree. Graduate degrees may also be included for purposes of the VR program, as required by section 103(a)(5) of the Rehabilitation Act of 1973, as amended by title IV of WIOA. A recognized postsecondary credential is awarded in recognition of an individual's attainment of measurable technical or industry/occupational skills necessary to obtain employment or advance within an industry/occupation. These technical or industry/occupational skills are generally based on standards developed or endorsed by employers or industry associations. Neither certificates awarded by workforce development boards (WDBs), nor work readiness certificates, are included in this definition because neither type of certificate documents the measurable technical or industry/occupational skills necessary to gain employment or advance within an occupation. Likewise, such certificates must recognize technology or industry/occupational skills for the specific industry/occupation rather than general skills related to safety, hygiene, etc., even if such general skills certificates are broadly required to qualify for entry-level employment or advancement in employment.

8. ETA: Employment & Training Administration, the unit within the U.S. Department of Labor that administers WIOA.
9. Low Income: For purposes of WIOA youth, low income is 70% of the Lower Living Standard Income Levels.
10. Opportunity Youth: A youth aged 16-24 who does not have a high school diploma or has one but is not in school or working or is underemployed.
11. Out-of-School Youth (OSY): A youth who is not attending any school (as defined by state law) and meets one or more of the following criteria: 1) a school dropout; 2) has received a diploma or GED and is low income, but is basic skills deficient or an English Language Learner; 3) a homeless individual, a runaway, in foster care, or has aged out of foster care; 4) an individual with a disability; 5) pregnant or parenting; 6) a low-income individual who needs assistance to enter or complete an educational program or to secure or hold employment. Youth enrolled in postsecondary education are not eligible OSY.
12. TABE (Test of Adult Basic Education): A diagnostic test used to determine a person's skill level and aptitudes.
13. TEG: Training and Employment Guidance Letter, sub-regulatory operational guidance published by ETA.
14. USDOL: The United States Department of Labor.
15. WIOA: The Workforce Innovation and Opportunity Act of 2014.
16. Work-based Learning: A structured work experience program that provides students with real-life work experiences where they can apply academic and technical skills and develop their employability. Work-based learning programs are targeted to bridge the gap between learning and doing. Examples of this include Registered Apprenticeship and on-the-job training.
17. Youth: Under WIOA, a youth is an individual between the ages of 16 and 24.
18. Intake Specialist: WSM staff located in the Wheaton center who accept documentation, process eligibility, and provide information on available AJC and WIOA Youth services.

## **PART II. GENERAL CONDITIONS & TERMS**

### ***A. General Conditions***

1. The release of this RFP does not constitute an acceptance of any offer, nor does its release in any way obligate WSM to execute a contract with any proposer. WSM reserves the right to accept any offers, as a whole or in part, on the basis of the general conditions set forth in this

- RFP, and to evaluate all accepted proposals on the criteria in this RFP.
2. WSM issues this RFP with the explicit understanding that minor and major changes may be made, up to and including the option to rescind this RFP in its entirety, if such changes are deemed necessary to meet the objectives of the procurement process.
  3. Before preparing proposals, proposers should note that:
    - a. WSM will not be liable for any cost incurred in the preparation of proposals, nor the negotiation of contracts, including the costs of printing, copying, travel or staff compensation.
    - b. All proposals in their entirety will become the property of WSM upon submission.
    - c. The award of a contract for any proposed service is contingent upon:
      - 1) Adequate financial resources or the ability to obtain them;
      - 2) The ability to meet the program design specifications at a reasonable cost, as well as the ability to meet performance goals;
      - 3) A satisfactory record of past performance;
      - 4) A satisfactory record of integrity, business ethics, and fiscal accountability;
      - 5) The necessary organization, experience, accounting and operational controls;
      - 6) The technical skills to perform the work;
      - 7) Favorable evaluation of the proposal in relation to other proposals;
      - 8) Approval of the proposal by WSM; and
      - 9) Successful negotiation of any changes to the proposal required by WSM.
  4. It is important that proposers have substantive knowledge and understanding of WIOA Youth program requirements and the related state and federal rules and regulations: accordingly, WSM will make WIOA Youth related documents available to proposers during this solicitation.
  5. WSM reserves the right to negotiate the final terms of all contracts with successful proposers. Items that may be negotiated include but are not limited to type and scope of services, costs and prices, schedule of services, target groups, geographic goals and service levels.
  6. Likewise, WSM reserves the right to accept any proposal as submitted for contract award without substantive negotiation of offered terms, services, or costs. Therefore, proposers are advised to propose their most favorable terms initially.
  7. WSM is responsible for the final review, evaluation, and selection of service providers, and reserves the right not to fund any or all proposals. Proposals must be complete and must follow the format outlined in this RFP.

8. By submission of the proposal, the proposer certifies that in connection with this proposal:
  - a. The costs in the proposal have been arrived at independently without consultation, communication or agreement, for the purpose of restricting competition as to any matter relating to such costs with any other proposer or with any competition;
  - b. Unless otherwise required by law, the costs which have been quoted in the proposal have not been knowingly disclosed by the proposer, and will not be disclosed by the proposer, prior to the award directly or indirectly to any other proposer or to any competition; and
  - c. No attempt has been made by the proposer to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.
9. The proposer agrees that no employee or member (paid or unpaid), including immediate family members, will participate in WSM activities related to the selection, award, or administration of WIOA-funded contracts.
10. The person(s) signing the proposal certifies that the individual(s) responsible for the decision to offer the proposal have not, and will not, engage in any actions contrary to Section II, A.8.
11. Proposals will be received and maintained in compliance with applicable Maryland open records laws and regulations.
12. Due regard will be given to the protection of proprietary information contained in all proposals received. However, proposers should be aware that all materials associated with this procurement are subject to the terms of the Freedom of Information Act, the Privacy Act and all rules, regulations and interpretations resulting there from. It will not be sufficient for proposers merely to state generally that a proposal is proprietary in nature and therefore not subject to release to third parties.
13. Any proposer awarded funds to provide services will be expected to operate services of professional quality, maintain proper programmatic and fiscal controls, submit timely reports as required, and comply with the requirements of the OMB Uniform Guidance set forth at 2 CFR Part 200, the WIOA statute, regulations and policies. Contractors must ensure that programs are administered with safeguards against fraud and abuse as set forth in the WIOA regulations: that no portion of the WIOA program will discriminate against, deny benefits to, deny employment to, or exclude from participation any person on the grounds of race, color, national origin, religion, age, sex, disability, or political affiliation or belief. Moreover, programs must comply with the Americans with Disabilities Act [ADA], which requires, among other things, that all programs be fully accessible to persons with disabilities or be linked with programs of equal quality, which are accessible.
14. Proposers are encouraged to read this entire Request for Proposals (RFP) before preparing and submitting their proposal. Proposals that do not follow the general format, fail to include

all specified minimum requirements, including the necessary documentation and certifications in this RFP, or are not submitted by the due date and time will not be considered for funding.

## ***B. Notification and Distribution***

The RFP is available for distribution on Tuesday, February 11, 2025, on the WSM website at <https://worksourcemontgomery.com/about/procurement/>

Additional reference material can be obtained from the following web sites: <https://worksourcemontgomery.com/>, <https://www.dlr.state.md.us/>, [www.doleta.gov](http://www.doleta.gov), and [www.workforcegps.org](http://www.workforcegps.org).

Information relating to the RFP, including updates, amendments, minutes of the Virtual Bidders' Conference, and responses to questions submitted by email, will be posted to <https://worksourcemontgomery.com/>. Interested proposers are responsible for monitoring the website for updates; WSM does not intend to send individual notification of updates directly to proposers.

## ***C. Virtual Bidders' Conference, Questions, and Mandatory Letter of Intent***

**Virtual Bidders' Conference:** WSM will conduct a Virtual Bidders' Conference on Tuesday, February 18, 2025, from 3:00PM-4:00PM Eastern. WSM staff will be present at that time to discuss the RFP. This session will be the only opportunity to interact with WSM staff to obtain such assistance.

Prospective proposers must register to attend the Virtual Bidders' Conference by sending an email to [procurement@workforcemontgomery.com](mailto:procurement@workforcemontgomery.com). Provide your organization's name, name(s) and title (s) of those attending. Organizations are limited to two attendees. Those organizations that register will receive a link to the Virtual Bidders' Conference.

After the Virtual Bidders' Conference, WSM will accept written questions via email only to [procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com) through 5:00PM Eastern on Wednesday, February 21, 2025. "WIOA Youth RFP" must be written in the subject line. WSM will publish all question and answers on its website at [WorkSource Montgomery | Procurement](#) by 5:00PM Eastern on Tuesday, February 25, 2025.

WSM reserves the right to extend the deadline for Letters of Intent should the initial response be deemed insufficient. If necessary, WSM may amend scheduled due dates. All such changes will publish at [WorkSource Montgomery | Procurement](#).

### **D. Proposal Delivery and Specifications**

All proposals and modifications must be electronically received ([procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com)) by WSM no later than Friday, March 14<sup>th</sup>, 2025, by 5:00PM Eastern.

*The proposer is solely responsible for assuring that anything sent to WSM arrives safely and on time. Any submission to WSM, including inquiries regarding the RFP, and/or proposals not received at either the specified place ([procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com)) and/or by the specified date and time will be rejected and returned to the proposer unopened by WSM.*

Proposals must be submitted in accordance with Part V: Solicitation Provisions of this RFP.

The issue of this RFP is coordinated by:

Ernestine Chambers  
Sr. Dir of Strategic Operations  
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1801 Rockville Pike, Suite 320  
Rockville, MD 20852  
[procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com)

### **E. Non-Appropriation and Cancellation**

WSM may cancel any resulting executed agreement with 30 days' written notice, and the agreement shall be subject to the availability of Federal and/or State funding.

### **F. Eligible Proposers and Proposal Acceptance Criteria**

All governmental and private organizations, whether for profit or nonprofit, may apply. Non-governmental proposers must submit evidence of their legal status in the form of a printout of their Certificate of Status from the MD Secretary of State, or comparable agency from their home state, indicating the type of business (corporation, LLC, LLP, etc.).

No organization, nor its named partners or subcontractors, will be considered that:

1. Have been debarred by an action of any government agency; or
2. Have a previous contract with any governmental entity in Maryland terminated for cause; or
3. Have not complied with an official order of any agency of the State of Maryland or the

United States Department of Labor to repay disallowed costs incurred during their conduct of projects or services; or

4. For any other good and just cause determined at the sole discretion of WSM.

These provisions also apply to include any related entities of the proposer.

WSM reserves the right to accept or reject any or all proposals received or portions thereof. At WSM's discretion, all or part of this procurement may be cancelled or withdrawn, or may be declared failed and all, or portions of, the RFP reissued. WSM also reserves the right to waive minor technical irregularities in offers received. During the technical review period, WSM reserves the right at its sole discretion and sole judgment to contact proposers for the purpose of offering them the opportunity to clarify any minor technical points, with the determination being at WSM's sole judgment.

WSM may accept projects or groups of services from different proposals if separation of projects and/or services is practical and independent pricing is available, unless the proposer qualifies their proposal with specific limitations. These services and/or projects may be combined with other services and/or projects at the discretion of WSM, unless the proposer qualifies their proposal with specific limitations.

The proposer must sign the assurances at Attachment B. The submission of a proposal in response to this RFP with signed Cover Page (Attachment A) is an affirmative act of agreement and/or assurance that the proposer and its collaborators will comply with these requirements. If unable to comply with these requirements, please do not submit a proposal.

## **G. Award Process and Notification**

WSM is soliciting WIOA Youth proposals based on USDOL projections and historical financial data, with the expectation that it will receive notification of its WIOA Youth funding allocation in May 2025. The size of the contract awarded will be dependent upon available WIOA Youth funding.

The WSM Board of Directors, in partnership with the Montgomery County Workforce Development Board, will select proposals and approve funding and service levels in May 2025. Proposers will be notified of the decision on or around April 18, 2025. Contract operations will begin July 1, 2025, contingent upon successful contract negotiations. If an award is made, the contract will be cost reimbursement. Contracts may be renewed for up to three years after the initial year, contingent upon funding availability and satisfactory performance.

## ***H. Debriefing and Protest***

### ***Debriefing***

The purpose of a debriefing is to help unsuccessful respondents better understand why they were not selected. Respondents who desire a debriefing session must submit a written Request within ten (10) business days of the announcement of WSM's procurement decision.

WSM will send an email acknowledgement of its receipt of the request. It will then contact the respondent to schedule the debriefing session at a mutually agreeable day and time, typically within ten (10) business days of its receipt of the respondent's request.

During the debriefing session, WSM staff and/or independent evaluators will discuss with the respondent and review: (a) the evaluation process and (b) how the respondent's proposal was scored. WSM will observe relevant legal restrictions on the timing and extent of which certain proposal-related information and documentation can be disclosed. It will not release confidential or proprietary information belonging to other respondents during any stage of the debriefing or protest and hearing process.

### ***Protest Hearing***

If a respondent wishes to protest WSM's procurement decision, it must submit a written Notice of Protest within ten (10) business days of the announcement of the Board's procurement decision. This written notice must be sent to Ms. Tina Edmundson, Administrative Coordinator, at [tedmundson@worksourcemontgomery.com](mailto:tedmundson@worksourcemontgomery.com) and must clearly state that it is protest and identify the following:

- The solicitation being protested (i.e., RFP name, number, and date);
- The business name and address of the protesting party;
- The primary point of contact for the protesting party, including the person's name, title, email address, and phone number;
- The specific rationale for the protest and any requested remedy(ies); and
- All relevant documents in the respondent's possession or control which are material for the consideration of the protest.

WSM will contact the respondent to schedule a Protest Hearing at a mutually agreeable day and time, typically within ten (10) business days of its receipt of the respondent's Notice of Protest.

For the Protest Hearing, WSM will name a committee to meet with the respondent to discuss its rationale for the protest along with the documentation that was provided in its Notice of Protest. The committee will review the facts presented and the remedies requested by the respondents.

After consideration the information provided, the committee may deny the protest, or it may recommend appropriate actions and/or remedies allowable under federal and state rules and regulations, consistent with WSM Procurement Policies. The committee's decision shall be the final decision and end the protest process at the local level.

WSM may award a contract without delay during the protest process if it determines that doing so is in the best interests of the Board and its customers.

## ***I. Conflict of Interest***

Maryland Department of Labor policy for conflict of interest for local Board membership:

1. No member of any Board shall cast a vote on the provision of services by that member or organization which that member directly represents, or vote on any matter, which would provide direct financial benefit to that member.
2. There will be no vendor representation on Board committees that make funding recommendations.
3. Board members who have vendor affiliations must disqualify themselves from any Board funding discussions and/or votes. This includes **direct and indirect** affiliation.

Additionally, Committee and Board members who are vendors should be excluded from the development of the RFP statement of work and the development of the evaluation and selection criteria.

Maryland Department of Labor requirements adhere to 2 CFR 200.318(c)(1) general procurement standards codes of conduct:

“No employee, officer, or agent must participate in the selection, award, or administration of a contract supported by a federal award if he or she has a **real or apparent** conflict of interest. Such a conflict arises when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated therein, **has a financial**

**or other interest** in or a tangible personal benefit from a firm considered for a contract.”

Proposers must consider the WSM Conflict of Interest policy and disclose any conflict of interest or the appearance thereof by completing the disclosure section of the Proposal Cover Sheet.

## PART III. PROGRAM DESIGN AND SPECIFICATIONS

To implement its guiding principles for Opportunity Youth programming, WSM is seeking innovative program designs that prepare youth for today’s workforce. This includes employer-driven career readiness training, technical training, and paid hands-on learning, all of which lead to credentials and successful placement in employment and/or post-secondary education. These services should also address barriers to employment. WSM is soliciting proposals to provide the following services:

1. Recruitment
2. Assessment and Case Management Services
3. Career Readiness
4. Occupational Training
5. Paid Work-based Learning
6. Placement Services and Retention

### ***A. Eligible Youth (WIOA Title I B, Section 129) and WSM Target Populations***

To be eligible to participate in WIOA youth activities, an individual must be considered an out-of-school youth at the time the eligibility determination is made.

The term “out-of-school youth” means an individual who is:

- (i) Not attending any school (as defined under State law);
- (ii) It is between the ages of 16 and 24; and
- (iii) Falls into one or more of the following categories:
  - (I) A school **dropout**.
  - (II) A youth who is within the age of compulsory school attendance but has not attended school for at least the most recent complete school year calendar quarter.
  - (III) A recipient of a secondary school diploma or its recognized equivalent who is a **low-income individual** and is:
    - a. Basic skills deficient; or
    - b. An English language learner.
  - (IV) An individual who is subject to the **juvenile or adult justice system**.
  - (V) A **homeless** individual (as defined in section 41403 (6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e–2 (6))), a

homeless child or youth (as defined in section 725 (2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a (2))), a **runaway**, in **foster care or has aged out of the foster care system**, a child eligible for assistance under section 477 of the

Social Security Act (42 U.S.C. 677), or in an out-of-home placement.

- (VI) An individual who is **pregnant or parenting**.
- (VII) A youth who is an individual with a **disability**.
- (VIII) A **low-income individual who requires additional assistance** to enter or complete an educational program or to secure or hold employment.

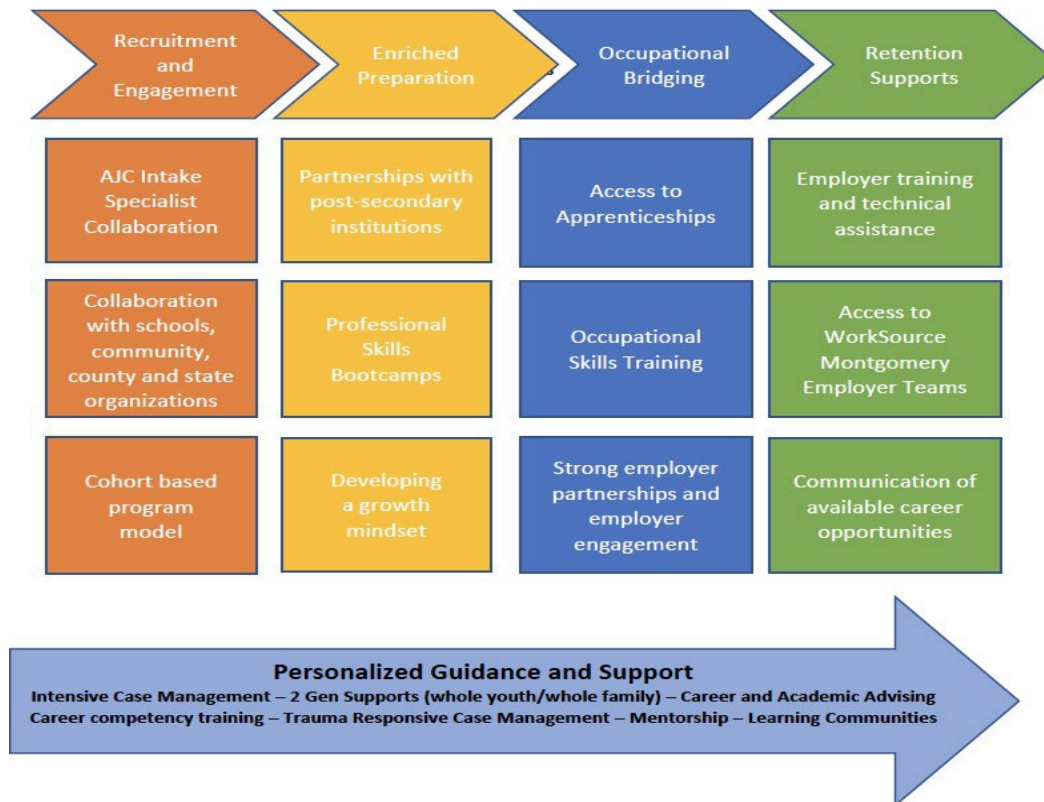
Proposed programs should target the population prioritized by WSM:

1. Second Language Learners
2. Youth with disabilities
3. Justice-involved youth
4. Young parents
5. Youth of color
6. Youth who are aged out or aging out of foster care

## **B. Career Pathways**

Career Pathway programs provide job seekers with a comprehensive approach designed to lead them toward self-sufficiency. WSM has adopted an evidence-based career pathway model, which integrates proven intervention strategies and best practices that link systems, youth, and employers in preparing and placing Opportunity Youth in middle-skill jobs. This career pathway model addresses both education and employment simultaneously by connecting multiple systems.

### WIOA Youth Career Pathway Logic Model



The four phases of the career pathway model are as follows:

1. Recruitment and Engagement: This phase focuses on outreaching to eligible youth and engaging certified youth in programs and services to identify their short-term and long-term goals, creating an individual service strategy and encircling them with supportive services to address barriers to their success such as basic (housing, health, food security) and other (childcare, transportation, etc.) needs.

Services must include the following:

1. Assessment of Career Interest and Aptitude, Basic Skills, Life Domain Factors, and industry specific assessments as identified by local employers
2. Creation of an individual service strategy that outlines short-term and long-term goals, action steps to accomplish identified goals and referrals for barrier reduction
3. Career awareness and identification of a career path in an in-demand industry
4. Guidance and counseling including referrals, as needed

2. Enhanced Preparation: This phase provides basic education and skill development as well as career awareness and readiness. Goals are high school diploma or GED (if needed), basic skill remediation, and building career readiness skills. Services must include the following:

1. Connecting youth to a GED or high school equivalency program
2. Tutoring
3. Career exploration through employer-related activities such as industry tours, job shadowing, etc.
4. Career readiness and competency training
5. Paid work experience
6. Continued work on barrier reduction including follow-up referrals and support services
7. Continued guidance and counseling

3. Occupational Bridging: This phase provides work-based learning which includes technical, professional, and/or college-level education plus industry specific paid work experience. Goals are attainment of stackable credentials recognized by USDOL and Maryland Department of Labor, entering accredited post-secondary education, and employment in a job related to training that leads to careers with sustaining wages. Services must include the following:

1. Enrollment in in-demand occupational training
2. Subsidized work-based learning through internships, on-the-job training, and other subsidized employment
3. Supports such as study skills, tutoring, and access to college supports
4. Credential attainment
5. Placement in employment at an average of \$17.15 per hour or higher or post-secondary education
6. Continued guidance and counseling including referrals, as needed

4. Retention Support: This phase provides support to ensure employment and post-secondary education persistence and success. Examples include just-in-time support, peer and professional networks and youth leadership. Goals are retained employment, confirmed at regular intervals. Services must include the following:

1. Job retention support
2. Job clubs
3. Peer and Professional networking
4. Youth leadership

### ***C. Employer Agreements / Employer Letters of Support and Target Industries***

Employer participation is integral to a program that meets employer needs, from involvement in program design to job placement and retention. To ensure employer participation, proposals must include employer agreements or employer letters of support that establish a clearly articulated role and benefit for both employers and youth.

Employer Agreements / Employer Letters of Support should include at a minimum:

1. A clearly defined role for the employer during the program design and implementation phases.
2. Proposer's commitment to create assessment and screening strategies based on employer feedback.
3. A Strategy for work-based learning for the youth job seeker including but not limited to pre- apprenticeship, internships, job shadowing, and on-the-job training.
4. Employer commitment to interview youth for open positions upon completion of training.

Employer Agreements must be submitted with the proposal as Attachment L. While WSM prefers employer agreements, it will also accept local employer Letters of Support that outline the experience of working with the proposer in Montgomery County.

### ***D. Work-based Learning Component***

WIOA emphasizes paid work experience coupled with an academic and/or occupational education component. WSM requires that a minimum of 25% of expenditures be dedicated to participant wages, either paid directly or as reimbursements to employers, and to related participant support costs such as work equipment and transportation to work. This also includes staff time working with employers, evaluation, employer orientation and other related costs. Please refer to TEGL 8-15 and TEGL 21-16 (page 15) for further information.

All proposals must include a work-based learning component such as, but not limited to, the following:

1. Apprenticeship
2. On-the-job Training
3. Paid Internship
4. Subsidized Employment

The chosen work-based learning component must be developed in collaboration with the employer(s) and clearly defined in the employer agreement(s).

## ***E. Program Requirements***

### **1. WIOA REQUIREMENTS**

WIOA includes specific requirements that must be included in program design. These include assessments, program strategies, program activities, and program linkages to employers and are described in detail below.

#### **a. WIOA Program Design**

Section 129(c) (1) (C) of WIOA states that funds allocated to youth service providers should be used to carry out the following program design:

1. Provide an objective assessment of the academic levels, skill levels, and service needs of each participant. This assessment shall include a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, and developmental needs for the purpose of identifying appropriate services and career pathways for participants.
2. Develop service strategies for each participant that are directly linked to performance outcomes and shall identify career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services for the participant identified in objective assessment.
3. Provide:
  - a. Activities leading to the attainment of a secondary school diploma or its recognized equivalent or a recognized postsecondary credential;
  - b. Preparation for postsecondary educational and training opportunities;
  - c. Strong linkages between academic instruction and occupational education lead to the attainment of postsecondary credentials;
  - d. Preparation for unsubsidized employment opportunities; and
  - e. Effective connections with employers, including small employers, in in-demand industry sectors and occupations.

#### **b. WIOA Program Elements**

Per Section 129(c) (2) of the Act, the following fourteen (14) elements **must be included in youth programs**. These services must be accessible to participants (based on need) and can be offered through collaborative partnerships utilizing community resources. If a proposer does not directly provide the services listed, it must demonstrate the ability to collaborate with other organizations to provide such services. The proposer will be responsible for ensuring that each

participant receives the full continuum of services needed to address their needs and achieve their education and employment goals. The proposer must complete Attachment I to indicate its plan for providing all 14 elements.

Barrier reduction is critical to successful WIOA Youth programs. Youth are eligible for WIOA programs because they have barriers to education and employment. All WSM programs must demonstrate the capacity to address the barriers faced by their target population in the form of necessary support services, both on-site and through referral

1. Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential;
2. Alternative secondary school offerings;
3. Paid and unpaid work experiences that have as a component academic and occupational education, which may include:
  - a. summer and year-round employment opportunities; pre-apprenticeship programs;
  - b. internships and job shadowing; and
  - c. on-the-job training opportunities;
4. Occupational skills training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area involved;
5. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
6. Leadership development opportunities, which may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate;
7. Supportive services;
8. Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months;
9. Follow-up services for not less than 12 months after the completion of participation, as appropriate;
10. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate;
11. Financial literacy education;

12. Entrepreneurial skills training;
13. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration;
14. Activities that help youth prepare for transition to postsecondary education and training

**c. Additional Program Elements Desired by WSM**

In addition, the following program elements are required by WSM. Any proposal that does not demonstrate these elements will not be considered.

1. Alignment with Montgomery County high growth industries including coordination with WSM sector partnerships, initiatives, and employers.
2. Youth-friendly environment with extended, flexible hours of operation.
3. Commitment to on-going professional development of program staff, including training on business engagement, workforce and youth development competencies and best practices.
4. Work readiness training aligned to the needs of local employers.
5. Career interest, aptitude, and academic assessments inclusive of basic skills, occupational skills, prior work experience, employability, interests, aptitudes (including interests in and aptitudes for nontraditional jobs), supportive service needs, and developmental needs for the purpose of identifying appropriate services and career pathways.
6. Occupational training and/or postsecondary education for occupations that lead to self-sustaining wages in one of WSM's high growth/high wage sectors.
7. A connection to a high school completion option recognized by employers and the state of Maryland for youth without high school diplomas.
8. Connection to "on ramps" – programs that serve the target population, provide stabilization and supports, and allow youth to demonstrate motivation and readiness.
9. Multiple entry and exit points to ensure access for youth with varied needs and goals, with the potential to earn stackable credentials prior to final completion.
10. Individual Service Strategies for each participant that are directly linked to WIOA performance outcomes and that identify career pathways that include education and employment goals (including, in appropriate circumstances, nontraditional employment), appropriate achievement objectives, and appropriate services for the participant considering the assessments (as previously mentioned).
11. Connection to the local AJC includes but not limited to the Youth Liaisons and career and job search resources.
12. Engagement strategies to assure participant retention and ultimately participant success.

## ***F. Performance Measures***

Programs must be designed to achieve the WIOA performance goals stated in Part I. B. of this RFP. The proposer is asked to consider these long-term performance measures in any program strategy, data collection, or management design decisions they make. All activities and performance measures are documented in both WSM and Maryland Department of Labor online data systems.

Additionally, WSM will also establish local-level performance measures for each service component as indicated in Part I.B. of this RFP.

## **Part IV. STATEMENT OF WORK**

### ***Attachment H: Proposal Narrative***

The Narrative is the body of the proposal and should give reviewers a clear picture of the organization's capacity to operate the proposed program, the design and cost of the project, activity or service, the anticipated outcomes, and the provider's capability of delivering the services being proposed. Details must be clearly described in the narrative and included in organizational charts, staff resumes, implementation timeline, and budget. **It must be formatted in 12-point Calibri font in standard portrait layout (8 ½ x 11), single spaced, with 1-inch margins, must include page numbers, and must adhere to the page limitations for sections 1, 2, 3, and 4 below.**

The questions below must be answered in the Narrative; proposals are required to include the headers and questions in the body of the narrative. Also, proposers should use affirmative language (will, shall) to demonstrate commitment.

#### ***1. Executive Summary – 1 page***

Provide an executive summary describing your organization and its capacity to provide the services described within this proposal.

#### ***2. Organizational Capacity – up to 10 pages (excluding required forms)***

1. What is your organization's mission, and how does it align with this funding opportunity and its goals? Why is your organization in the best position to deliver an innovative career pathway program that includes apprenticeships, direct hire opportunities, and work experience?
2. Describe your organization's knowledge, expertise, and experience working with youth facing challenges, particularly in connecting them to structured pathways such as apprenticeships, direct hire placements, and work-based learning opportunities.
3. Describe your organization's previous experience administering federal grants and any previous funding received from WSM. This response should clearly tie back to the

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required Organizational, Administrative, and Financial Capacity Checklists and the related documents.

4. As applicable to your program model, briefly describe the role of each proposed subcontractor, including how they were selected. Provide examples of your experience managing subcontracts for services, including monitoring subcontractors to ensure proper fiscal oversight, accountability, and quality service delivery.
5. Identify any local community partner relationships that you will leverage to support the proposed program and its participants. Explain how these partners will contribute to delivering apprenticeships, direct hire placements, and work experience opportunities.
6. Describe your experience with cost reimbursement contracts. How will you fund start-up activities and the associated costs of the program? How will you manage the upfront financial costs of work experience activities, such as meeting internship payroll prior to reimbursement?
7. Describe your organization's experience using data tools to track activities and performance, including quality assurance processes. Provide examples of how data has been used to guide midcourse corrections and ensure successful program outcomes.
8. How will you provide professional development to staff in business engagement, workforce development, and youth development practices? Include details about competencies to be developed, certifications to be attained by position, anticipated costs, and time frames.
9. How will your organization deliver apprenticeships, direct hire placements, and work experience opportunities to program participants? Describe your approach to collaborating with employers, preparing participants, and integrating these components into a comprehensive career pathway program.
10. Describe your overall management plan for delivering services, including the systems, procedures, quality assurance measures, and controls that will ensure contract compliance, delivery of high-quality services, and achievement of program objectives.
11. Describe how you will track and measure the success of the proposed program. Include details on metrics, tools, and methodologies used to evaluate outcomes for apprenticeships, direct hire placements, and work experiences.

Provide your plan for staffing the proposed program, including timelines for recruiting, hiring, and training. Ensure this response is tied back to the required organizational charts and job descriptions provided as attachments to the proposal narrative. *Organizational capacity will also be evaluated based on the Organizational, Administrative, and Financial Capacity Checklists and the related documents, and on the organizational and staffing plans provided by the respondent.*

### **3. Program Design – up to 15 pages**

1. Describe your organization’s experience in helping youth and young adults in the Montgomery County region become career ready. Describe the challenges related to this population. Include your experience in serving the priority populations described in Part II.A.
2. Describe your knowledge of the labor market area for Montgomery County and the potential opportunities available for youth and young adults. Reference existing relationships with local businesses that may be agreeable to providing work experience opportunities. This response should clearly tie back to the required employer agreements / letters of support attached to the proposal.
3. Provide a detailed description of your youth program and the activities in which a customer would participate including all services received. Fully describe how each activity will support goals for education/skill certification and full-time employment in good jobs.
4. Describe in detail your strategies for targeted outreach, recruitment, enrolling and orienting youth. Please identify any unique recruiting timelines and/or include strategies for maintaining an active caseload throughout the year. Also discuss your experience in recruiting the priority populations described in Part II. A.
5. Describe how youth will be assessed upon enrollment. Include a description of any tools or methods used to determine the following: levels of basic skills, work readiness skills, interests and aptitudes, occupational skills and supportive service needs. Explain how these assessments inform the service strategy for youth.
6. Describe your experience in tracking/reporting outcomes, including any experience using Maryland Workforce Exchange. Include specific outcomes achieved in similar projects.
7. Describe your strategies for incorporating a career pathway approach into your service delivery system. Identify strategies that move youth along a continuum to increased employability.
8. Define exceptional customer service. Describe how you provide exceptional customer service.
9. Explain how you will obtain and use feedback from customers to improve the delivery of service in WSM AJCs.
10. Explain how you will use emerging technologies to improve the quality and efficiency of services to youth.
11. Describe what you consider to be current or past successful collaborations? What made it a success? Include any local relationships in the Montgomery County region.
12. Describe how you will collaborate with the WSM AJCs (including the Youth Development team) to assist youth in obtaining employment and achieving the required average wage at

placement.

13. Describe in detail how your organization incorporates work-based learning activities to provide opportunities for youth and young adults to gain work experience. Describe the balance between classroom-based activities and work-based learning opportunities.
14. Describe your process for following up with youth. Identify strategies used to ensure participants retain employment and/or persist in college. How will you maintain contact with youth and assist them during the follow-up period?
15. How will you ensure that your services are delivered in a way that makes them equally accessible to individuals with all types of disabilities?

### ***Attachment I: WIOA Elements***

The proposer must provide at a minimum 8 of the 14 elements directly: Labor Market Information, Leadership Development, Paid Work Experiences, occupational training, supportive services, follow-up services, comprehensive guidance and counseling, and activities to help youth prepare for and transition to post-secondary education and training. Other elements may be provided through referral to community partners and other resources. Attachment I must be completed to indicate which organization(s) will provide the 8 remaining elements. For any element to be provided by referral, specific referral resources must be listed.

### **Attachment J: Implementation Timeline (up to 3 pages)**

The proposal must include an Implementation Timeline that details all of the activities necessary to implement and operate the program, from start-up through completion of the first program year, including time frames for each activity, identification of the partner and/or subcontractor (if applicable) or key staff positions responsible for each activity, and strategies to achieve WIOA and contracted performance goals. Proposers are encouraged clearly present information using a visual format, such charts or smart art tools.

## **PART V. SUBMISSION REQUIREMENTS**

### **Proposal Instructions**

Proposals shall be submitted electronically to [procurement@worksourcemontgomery.com](mailto:procurement@worksourcemontgomery.com).

Please note that WSM has a 25 MB file size limitation for incoming emails. If an organization's proposal exceeds 25 MBs, it may split its response into multiple emails for submission. As such,

it should use the following format for the title of each email: “Name of Organization – Youth Proposal Part 1 of X”. A confirmation email will be provided by WSM for each email received.

WSM will NOT pay for any expenses incurred prior to the execution of a contract or issuance of a formal Letter of Intent. Please be advised that WSM monitors all programs at least once during a contract period. Contractors may be required to provide documentation of expenses as related to the negotiated budget. Proposals may be withdrawn by written notice. Withdrawals will be accepted at any time up to the execution of a contract.

### ***Format/Required Attachments***

Proposals must be assembled in the following order.

1. Attachment A – Cover Page – Must be signed
2. Table of Contents
3. Attachment B – Assurances - Must be signed
4. Attachment C – Submission Checklist Form
5. Attachment D – Organizational Status and Capacity Checklist Part I & II ***for both the Proposer and any proposed subcontractor(s)*** – Must be signed
6. Attachment E – High Level Organization Chart – proposer’s entire organization including WSM program
7. Attachment F – Program Level Organization Chart – proposed staffing structure for WSM contract including all levels of management and front-line staff
8. Attachment G – Program Staff Job Descriptions labeled with employee name, when known, paired with Program Staff Resumes labeled with job title
9. Attachment H – Proposal Narrative
10. Attachment I – WIOA Elements
11. Attachment J – Implementation Timeline
12. Attachment K – Budget – 6 worksheets, including narrative **NOTE: This must be submitted as both PDF format and the excel spreadsheet.**
13. Attachment L – Employer Agreements / Employer Letters of Support
14. Attachment M – Reference and Performance History Report from Two Customers
15. Attachment N - MBE Documentation
16. Attachment O – Certificate of Status with Maryland or applicable state in which the organization is chartered

## Proposal Evaluation Criteria

Proposals will have 2 levels of evaluation. In Level 1, WSM contracted staff will evaluate each proposal with respect to its basic responsiveness and completeness. All proposals that are complete and contain all mandatory elements (e.g., received within deadline, meets page limitations, includes required forms, etc.) will be passed along for Level 2 evaluation.

Level 2 will be completed by a sub-committee selected by the Montgomery County Workforce Development Board. The sub-committee will recommend selected proposal(s) for funding to the Workforce Board for their final approval.

As the sub-committee evaluates the proposal, it will take into consideration the following factors:

1. Adequate financial resources or the ability to obtain them;
2. Comprehensive and complete understanding of the Montgomery County Labor Market and successful experience working in local communities;
3. The ability to meet the program design specifications at a reasonable cost, as well as the ability to meet performance goals;
4. A satisfactory record of past performance;
5. A satisfactory record of integrity, business ethics and fiscal accountability;
6. The necessary organization, experience, accounting and operational controls; and
7. The technical skills to perform the work.

<b>Evaluation CRITERIA</b>	<b>POINTS</b>
1. Organizational Capacity	35
2. Program Design, including local experience in Montgomery County	35
3. Budget	30
Total from Narrative	100

## PART VI. BUDGET

The budget package includes six parts, which should be assembled in the following order:

1. Narrative Justification (no form provided)
2. Budget Detail
3. Staff Chart
4. Staff Allocations
5. Facilities Worksheet
6. Participant Wage Worksheet

## Attachment K: Budget

**Line-Item Budget:** When preparing your budget, please be sure to include only those costs that are necessary, allowable, and reasonable, consistent with OMB Uniform Guidance at 2 CFR part 200 and the State of Maryland Office of Policy Management Cost Standards. Use the budget forms provided as Attachment K.

Using the worksheet within the budget file, provide a budget narrative to describe how your organization arrived at the program costs being proposed. For each cost within each line item, specify the quantity and unit cost as well as the total cost. For services purchased from a third-party vendor, identify the vendor and basis for selection, i.e., competitive bid, request for quotes, etc. The cost data in the budget forms must be consistent with, and supported by, the budget narrative.

The budget will be evaluated based on cost-effectiveness, accuracy and completeness. The method of cost calculation must be provided for each budget line item. Proposers are encouraged to provide as much detail as possible to demonstrate that all costs are necessary, reasonable and allocable.

**Limitation on General Overhead & Administrative Costs or Indirect Costs:** General Overhead and Administrative or Indirect costs will be reimbursed monthly at a rate of no more than 10%. Administrative costs include those costs associated with performing the following administrative functions: 1) accounting, budgeting, financial and cash management functions; 2) procurement and purchasing functions; 3) property management functions; 4) personnel management functions; 5) payroll functions; 6) coordinating the resolution of findings arising from audits, reviews, investigations and incident reports; 7) audit functions; 8) general legal services functions; and 9) developing systems and procedures, including information systems, required for those administrative functions. These costs may not be included in the direct cost line items.

**Limitation on Profit:** For-profit providers may earn a reasonable and mutually agreeable profit (Per 20 CFR 683.295).

**Minimum Expenditure for Paid Work Experience:** The combined costs of participant wages, fringe benefits, and support required for participation in work experience must comprise at least 25% of the budget. The budget narrative must clearly identify and detail the costs of support that enable participation in work experience.

**Facilities:** The costs for space, including rent, utilities, and technology costs, should be calculated on the facilities worksheet. Facilities costs should be calculated based on proportionate use of the space, utilities, and technology in accordance with the proposer's cost allocation plan. Rental and/or leasing costs for copiers and other office equipment are facilities costs.

**Subcontractors:** If a subcontract with a subrecipient is proposed, a complete budget for the subcontract must be provided, including all the required budget forms. The proposer will be responsible for holding its subrecipient accountable for all the requirements, terms and

conditions contained in its contract with WSM. All subrecipient contracts that are not part of this contract must be approved by WSM.

**Use of Vendors:** Any services to be provided by third-party vendors must be identified, and the narrative must describe how the vendor was selected. WSM contractors must demonstrate compliance with state and federal procurement regulations in their own purchasing of goods and services. Vendor contracts between related parties may not include profit.

**Personnel Costs:** Costs for each staff position should be presented on the Staff Chart included in the budget package. When the individual who will fill the position has been identified, please list the name. Fringe benefits must be itemized and calculated on the Staff Chart.

**Staff Travel:** WSM reserves the right to approve the contractor's travel expenses. Local travel reimbursement may not exceed the IRS approved rate of \$0.56 per mile for 2021. All out-of-state travel expenses, including air fares and accommodation, must be purchased at the lowest available cost.

### ***Line Items and Calculation***

The Budget Narrative should clearly detail all costs within each line item, including the quantity and method of calculating the cost.

Work Experience Costs:

Participant Wage & Fringe: Complete the participant wage worksheet

Work Experience Support: Include costs of direct support necessary to enable participation in work experience activities, such as transportation to worksites, work attire or uniforms required by the worksite, and equipment required by the worksite.

**Program Costs:**

Staff Salaries: complete the Staff Chart provided.

*Note: complete the Staff Allocations Chart for any staff who will be charged partially by the proposed contract and partially by other WSM contracts and/or to non-WSM sources.*

Fringe Benefits: list each fringe benefit item and calculation on the staff chart.

Staff Travel:

- Local travel: indicate number of employees x number of miles x mileage rate. In the narrative, they specify the positions that will travel.
- Out of state travel: indicate the positions that will travel and the purpose and destination of travel, and show the calculations for transportation, accommodations, and meals.

Consumable Supplies: Consumable supplies are all tangible property items with a per-unit cost below \$5,000, including computing devices. List the type of supplies and cost calculation per

participant or per month for each item. Differentiate between supplies for staff use and participant use.

Participant Training: List the costs of training, including curriculum materials, tuition payments, proposed subcontracts, online learning subscriptions, and related books, supplies and fees.

Participant Support: Include costs of direct support to participants, such as transportation, short-term childcare, and basic needs necessary to enable program participation, and licensing fees, equipment, and clothing needed for job search and employment.

Miscellaneous: All other costs must be detailed and justified in the budget narrative.

General and Administrative or Indirect Costs: Up to 10% of the total costs requested may be budgeted for general and administration or indirect costs.

Profit: Profit may be budgeted by for-profit proposers only. Payment of profit may be contingent upon achievement of negotiated performance benchmarks.

## **PART VII. OVERVIEW OF ATTACHMENTS**

### **RFP ATTACHMENT FORMS PROVIDED BY WSM**

Attachment A:	Proposal Cover Page
Attachment B:	Assurances
Attachment C:	Proposal Checklist
Attachment D:	Organizational Status and Capacity Checklist
Attachment I:	WIOA Elements
Attachment K:	Budget
Attachment M:	Reference and Performance History Request

## RFP ATTACHMENT FORMS TO BE PROVIDED BY PROPOSERS

Attachment E:	High Level Organizational Chart
Attachment F:	Program Organizational Chart
Attachment G:	Job Descriptions paired with Staff Resumes
Attachment H:	Proposal Narrative
Attachment I:	WIOA Elements
Attachment J:	Implementation Timeline
Attachment L:	Employer Agreements / Employer Letters of Support
Attachment N:	MBE Documentation
Attachment O:	Maryland Certificate of Status or Comparable

### **Attachment L: Employer Agreements / Employer Letters of Support**

The Employer Agreements / Employer Letters of Support must include the information described at Section III. C. of this RFP and must be signed by an authorized representative of the employer.

### **Attachment M: Reference and Performance History Report**

Each proposer must provide at least two references from organizations other than WSM to demonstrate the organization's prior experience serving the target population(s) and delivering the proposed services. The reference and performance history report must be submitted as an attachment to this proposal from the referring organization, and the individuals providing the references should be advised that they may be contacted by WSM staff to discuss the report.

## **Attachment N: MBE Documentation**

As applicable, proposers may submit documentation of their status as a Minority Business Enterprise. Upon confirmation of the submitted documentation, proposers may receive five (5) bonus points as part of the proposal evaluation process described in Part V. Submission Requirements.

## **Attachment O: Maryland Certificate of Status or Comparable**

Each proposer must provide a printout of Certificate of Status from the MD Department of Taxation & Assessments, or a comparable agency from the organization's home state.